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A Knowledgeable Partner

Cornell Capital Group LLC (CCG) is a boutique investment management and advisory firm. We specialize in designing and implementing custom strategies and portfolios tailored to each individual client. Our goal is simple: to understand the needs of each client, create strategies that address their unique financial situation, and deliver the solutions that will help them reach their objectives.

Cornell Capital Group (CCG) provides clients with a number of important benefits:

Full Transparency

Through our trusted partner and custodian, Charles Schwab, you can easily view your portfolio at anytime so you will always know what is happening with your investments . Your money stays with you. We are granted a limited power of attorney to make investments on your behalf for a simple low fee. You can rescind that power at any time. There are no lockup periods of any kind. Through our quarterly memos, videos, and articles you will always be informed of our thinking on investments and market conditions.

Fundamental Valuation Based Investing

Warren Buffet noted with regard to investing " Price is What You Pay, Value is What You Get". Therefore the key to successful investing is insightful assessment of value. That is our focus at CCG. For this purpose we developed and employ proprietary valuation models. In addition, we utilize options to fine-tune the tradeoff between risk and return.

We Put Our Money Where Our Mouths Are

As a client of CCG, you will be investing right alongside the firm principals and their families. We personally stand behind our work and ensure that our interests align completely with our clients.

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Direct Access To Decision Makers

No more dealing with frustrating automated phone systems or navigating through layers of different people unfamiliar with your situation. At CCG, if you have any questions, the professionals who are directly managing your investments are only a phone call or email away. You go straight to the source.

No Conflicts of Interest

We are not part of a brokerage firm. We do not sell any other products or services. Our investment decisions are only driven by what will benefit our clients.

Low Cost for Active Management

Our transparent fee structure is extremely competitive, especially for active management, further maximizing our clients' after-fee performance. Our compensation is based solely on a percentage of assets under management.

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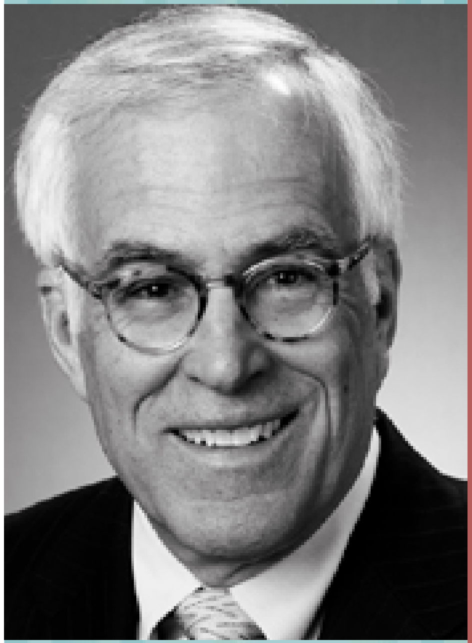

Dr. Bradford Cornell

A Relationship Built on Understanding and Expertise

The professionals at CCG bring proven expertise to every client relationship—backed by industry credentials, unparalleled academic backgrounds and practical experience. The team is led by Dr. Bradford Cornell, emeritus Professor of Financial Economics at the UCLA Anderson School of Management. Dr. Cornell received his Masters degree in Statistics and his PhD in Financial Economics from Stanford University. He has published more than 125 peer reviewed articles and four books on a wide variety of topics in applied finance. Through Dr. Cornell, the team has access to leading finance scholars worldwide.

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Spanning the divide between academia and practice...

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Why Have a Customized Individual Portfolio?

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One Size Does Not Fit All

Individuals have different risk preferences, objectives, and tax status, among other factors. We work with each individual client to design an investment strategy that simultaneously meets their needs and utilizes our skills.

You Maintain Full Control of Your Assets

CCG does not take custody of your assets. Your money is there for you whenever you need it, no strings attached.

Tax Management and Ethical Concerns

By holding a custom portfolio of individual securities we can efficiently manage capital gains and losses to optimize after-tax investment returns. We are also able to tailor your portfolio to reflect your ethical principles.

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Why Fundamental Valuation?

Future Cash Flows

Ultimately the only source of value of a security is the cash flows it provides for its owners. We belive a thoughtful comparison between those cash flows (value) and a security's current price is the key to rational long-term investing.

Academic Research

Academic research has consistently found that valuation is the only reliable predictor of long run returns.

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Let’s talk

To speak with one of the independent Registered Investment Advisors at Cornell Capital Group, please call 858.395.6387 or email info@cornell-capital.com. You can visit our website at www.cornell-capital.com.